

2024

**School of Education  
Ad Hoc Budget  
Committee  
April 19 – July 1**

Transparency ♦ Equity ♦ Imagination ♦  
Investment



# SOE Ad Hoc Budget Committee

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## Committee Charge

The Ad hoc budget committee first met on April 19, 2024 and was asked to create a written report of recommendations in the following categories:

- ❖ Changes to organization of academic programs and program area structure, including number and distribution of faculty leadership positions and number of degree offerings
- ❖ Staff support across the SOE and its affiliated centers, including potential for synergies both within the SOE and across campus
- ❖ Support of our teaching mission, including use of GPTI and course releases offered to faculty members
- ❖ Class capacity and the possibility of teaching larger sections
- ❖ Plans for future faculty and staff hires and support
- ❖ Other items as agreed upon by the committee (e.g. reworking budget categories, organization, and allocations).

## Committee Members

Valerie Otero

PROFESSOR,  
COMMITTEE CHAIR

Travis Anderson

ASSISTANT DEAN OF  
ACADEMIC PROGRAMS  
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## Executive Summary

The Ad Hoc Budget Committee (BC) of the School of Education (SOE) was tasked with providing recommendations to address budgetary challenges and to support the school's mission. This summary provides a concise overview of the recommendations we proposed to guide the SOE's leadership in making informed decisions to ensure financial stability and continued excellence.

The introduction to this report contextualizes the SOE budget, recent changes to our fiscal situation, and our current deficit which needs to be addressed. We also describe the process that led to the development of this report and some potential limitations. We recognize the complexity of our organization and acknowledge that recommendations may not fully account for challenges faced by individuals or units, long-term budgetary impacts, and related work that is already in progress. We also believe that budgetary decisions should be guided by our values of Democracy, Diversity, Equity and Justice. We draw inspiration from Shared Equity Leadership Models that integrate these values into diverse roles and broader organizational structures and cultures. In particular, we highlight transparency and equity as values that should guide budget decisions and processes. An equity frame asks that budgetary decisions take into account the identities and relative power of those impacted by those decisions, and that any decisions also be accompanied by transparent criteria and justification. Ultimately, we need to build more budgetary transparency to restore trust and equip our community to create the best possible pathways forward, maintain advocacy on the part of leadership in areas where the new budget model works against the SOE, and make more strategic investment in areas of growth.

We divided our recommendations into several sub-committee reports focused on different areas of the SOE. Key recommendations include:

- Teaching Loads and Course Variation
  - Create systemic, transparent, and equitable processes around differential teaching activities, including course releases and types (enrollment size, modality, TA support)
  - Centrally coordinate courses – including for new larger undergraduate courses – within and across program areas to create a regular course rotation that balances the need to teach core courses while honoring instructor's identity.
  - Explore creative ways to recognize indirect teaching and advising in faculty workloads
- Leadership and Administrative Roles
  - Carefully review the leadership structure to ensure all program areas are represented and that administrative job descriptions reflect the nature of the job and its compensation (e.g., releases, stipends).
  - Require Associate Dean roles to extend beyond 3 years.
- Creative Course Configurations
  - Explore creative and strategic new configurations for courses, including larger class sizes and additional modalities.
  - Create tools to help SOE instructors understand the cost-benefit of offering additional courses and/or sections.
- Undergraduate and Teacher Education
  - Build an infrastructure to support undergraduate and teacher education via additional leadership roles and a consistent system for budget autonomy, resource allocation decisions, and strategic coordination.

- Follow through on decisions about the size and scope of our teacher education programs grounded in budgetary trade-offs.
- Invest in software to help manage key processes (e.g., professional licensure).
- Develop a thoughtful approach to growth for majors and minors, including offering on-line courses and certificates.
- Graduate Education
  - Carefully offer PhD admissions in relation to projected assistantship options.
  - Audit PhD funding offers in comparison with AAU peers and implement practices that provide equitable PhD student experiences and support degree completion in five years.
  - Build and support MA programs with sustainable funding sources.
- Research Mission
  - Continue to invest in tenure-track faculty that support the research mission but fill tenure-track faculty vacancies after careful evaluation of programmatic research and teaching needs, with a focus on identifying SOE strengths.
  - Protect research activities by building in advising and student support to faculty workloads, and re-evaluating and reducing service obligations.
  - Develop principles that support Research Center development with sustainable budgets.
  - Support and recruit research faculty with a track record of bringing in external funding.
  - Allow PI's to retain a portion of their DAICR funding.
  - Develop an internal policy around course buyouts.
  - Invest in research support and infrastructure to sustain and grow our capacity to secure and manage external funding.
- Campus Funded Programs
  - The new budget model has led to a loss of key sources of revenue for CU Engage, The Learning Assistant (LA) program, Master of Arts in Teacher Leadership (MATL), and others. We recommend that leadership work with each program on longer term plans for sustainability, recognizing that each area has already started to identify opportunities for growth, potential areas for savings and creative partnerships. Any changes should build on these efforts and the deep knowledge their faculty/staff have of these programs. We also recommend supporting *all* centers to identify their needs and seek strategic support, as well as moving towards clear and equitable support of centers.
- Organizational Structures and Budgetary Practices
  - Explore ways to develop clearer, streamlined organizational structures and processes, including changes to budgetary practices, and broader efforts to build shared understandings about the budget.
- Ongoing Advocacy for SOE
  - Equity regarding funding for merit/salary increases, and counting of majors and minors.
  - Reconsider supplementary funding allocations
  - Strategies for funding programs that were previously funded by campus.

The BC's recommendations aim to address budgetary challenges while fostering long-term sustainability and growth. The focus is on enhancing transparency, equitable resource allocation, and strategic investment in key areas and services to support the SOE's mission and community.

# The School of Education Ad Hoc Budget Committee Report

## Fiscal Context and this Report

The School of Education has an annual budget of approximately \$20 million. Of this, \$11 million comes from campus funding allocated through the new CU Boulder [budget model](#). Of that \$11 million, approximately 60% comes from tuition allocations and 40% comes from centrally allocated “supplemental funds.” In addition to campus funding, the budget includes \$9-10 million per year in “Non-General Funds,” largely consisting of “restricted” funds such as gifts and grants that typically cannot be shifted into new purposes as well as auxiliary funds from Research Based Service Activities. Of course, exact numbers will vary from year to year. [Slides](#) on the [SOE Budget Sustainability website](#) provide more details.

In the last fiscal year, FY24 (i.e., 2023-24) the SOE had a budget deficit that was covered by shifting various expenses and using temporary funds. For this upcoming fiscal year, the SOE will need to make decisions to rectify our anticipated deficit of \$300,000, as well as additional cuts from the new budget model that will impact our centrally funded programs, including CU Engage, the Learning Assistant program, and others. Although we do not believe these deficits are reasons to worry, the goal is to make judicious decisions that put us on a path to sustainability moving forward and help rebuild our budgetary reserves.

**School of Education Fiscal Context:** While the SOE may have faced fiscal challenges on its own, there are some key drivers underlying this deficit, all of which pose challenges for us to address as a community. These challenges include:

- A. New university budget model.** Our campus has recently implemented a new budget model ([webpage](#); [executive summary](#)) that moves away from “continuing funding” and towards allocating portions of tuition revenue to each unit based primarily by a student’s major (“college of record”) and the department offering the course (“college of instruction”), along with recurring supplemental funds that support the SOE. Yet relative to the prior system, the result of this new model is to prioritize where students take classes, and how efficiently these are offered (e.g., how much tuition is received relative to the cost of offering a course). A key part of this model is “unit-based,” which means that revenue is shared, proportionately, with units, but that units also bear their own costs. Notably, the budget model shifted responsibility for many costs to the units, such as merit-based raises and fringe benefits. This is a significant driver of our long-term projected deficit.
- B. Decline in centralized funding:** By giving revenues from enrollment directly to the units, the campus has reduced their role in funding specific programs and services. While this results in some new funds for the SOE, this change ends significant annual resources that were previously used to support key programs that serve the whole campus, including CU Engage and the Learning Assistant (LA) program, as well as some special initiatives such as the Master of Arts in Teacher Leadership (MATL) program. In effect, we will by FY27, lose nearly \$1M in annual central

funding for these programs, which is almost 10% of our annual budget from tuition and supplementary funds. These programs are actively exploring alternative funding streams and making changes, but incorporating potential costs into the SOE budget is an additional challenge.

- C. SOE context and fiscal deficit:** The SOE would have faced a fiscal deficit even without these campus level changes, though the new budget model exacerbates the situation. As such, there is a need to reconsider our organizational approach and prior practices. We have had rapid growth in new, important, and exciting programs, particularly in undergraduate education, which is reflected in changes to our budget, staff, and faculty. We have also faced significant challenges with climate. These changes require us to re-examine our infrastructure with an equity lens to successfully build and sustain this work moving forward.
- D. Need for continued advocacy:** Although the new budget model was designed for financial resilience, transparency and equity, there are some areas in which small colleges and schools such as the SOE may be disadvantaged. By design and necessity, our programs are small and intensive, requiring small class sizes, extensive advising and many practicum and field placements. We will remain dependent on “supplementary” funding to support our programs; this funding is not ‘supplementary,’ but essential to our budget. In addition, our School provides leadership for several crucial campus initiatives, which are no longer supported by centralized campus funding. While most of our recommendations below reflect actions that we can take inside the SOE, we also recommend that we think--collectively and strategically--about how to advocate for crucial changes to the budget model, and how to prioritize those changes. We note some priorities for this advocacy in the final recommendation.

## What did we learn?

Finally, we wanted to outline a few contextual items for leadership and our SOE colleagues, to help them situate our committee’s recommendations and highlight what we learned from creating this report.

- A. Limits of information.** We hope that our recommendations are beneficial to the school, but we also recognize the complexity of our organization. Each committee member brought distinct knowledge and perspectives but cannot fully understand all the challenges faced by individuals or units in the SOE. It is also difficult to accurately estimate the true budgetary impact of these recommendations.<sup>1</sup> In addition, we found that dedicated SOE members have already begun the work of adapting their key functions to create long-term sustainability, so many creative changes are already in process.<sup>2</sup>

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<sup>1</sup> As a simple but perhaps illustrative example: providing a scholarship is a cost to the school but it may be that without this support an individual would not enroll. In even this simple case, forecasting the revenues (e.g., partial tuition) against the true costs (e.g., the marginal impact of one additional student in the program on staff and faculty resources) is difficult to evaluate.

<sup>2</sup> Where possible, we have included links throughout the report to proposals or other items that illustrate these creative changes.

As with any study, some topics were included, and others were omitted. For example, staff support was one element of our charge, given declines in the student-to-staff ratio.<sup>3</sup> We were informed early in the process that an outside consulting firm ([C-Shift](#)) was contracted to study the organization of the SOE's staff, and we spent minimal time broadly considering this area except as it came up in specific discussions. As another example, the SOE budget contains approximately \$9-10 million in "Non-General Funds", which are in addition to the approximately \$11 million annual budget. While we know this is largely composed of "restricted" funds, such as gifts, grants, and auxiliary funds that cannot be shifted into new purposes, we lack a real understanding of what composes this portion of the SOE budget and to what extent current spending choices are discretionary. Ultimately, this report should be considered a partial and introductory look at the SOE budget to help make initial plans for moving forward.

- B. The need for budgetary transparency moving forward.** One of our general, overarching, recommendations is to build more budgetary transparency moving forward; this will, we believe, build trust and resilience. Transparency is multi-faceted. First, our sincere hope is that future decisions should be made in ways that clearly explain the rationale and criteria for the decision, after being made in careful consultation with those involved. Even when we might disagree with a particular decision or outcome, there is value in understanding the reasons for that choice. Second, only by building our collective understanding of how the budget works can we equip our community to understand challenges we will face and create possible pathways forward. We hope we can find ways to all take interest and responsibility for the budget, and for generating pathways forward, in ways that will surely go beyond this report.
- C. A belief in our shared fate.** What recurred throughout our work is a reminder of the unique qualities of our school and its interconnected nature. Attempting to parse the contributions of our students, staff, and faculty into distinct units is a difficult, perhaps impossible, task. It may also not be advisable; we want to resist positioning programs as in competition with one another, and instead make decisions — and adopt practices — that benefit our School as a whole. Although our work highlighted areas where we believe we can make more equitable decisions, it also resurfaced a belief in our *shared fate*. We hope our conversations about budget priorities can nurture this sense of our collective and interdependent fate and future.
- D. Imagination and investment:** We wholeheartedly agree that the development of this report and taking a realistic view of budgetary realities is necessary. Yet we hope that this does not obviate the need for imaginative and strategic investment in areas of growth, and that our leadership works with central administration to understand what we contribute and try to fix aspects of the budget model that work against us. Some changes would have immediate budgetary impacts, but other changes — such as growing enrollment — are longer term given how they are incorporated into the budget model. There are other ongoing challenges - including salaries that are below those of our peer institutions, while residing in one of the most expensive areas of the

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<sup>3</sup> As part of the BC, we were given access to SOE-related data which may not be publicly available.

country — that will not be resolved by simply cutting support and placing more responsibilities on each of our shoulders. But we cannot just cut — we have to be imaginative and strategic and invest in areas that will build for the future.

## Recommendation 1: Teaching Loads and Course Variation

Over the past few years differential teaching loads have been negotiated by faculty on an individual, ad-hoc basis. As a result, course releases have been given to tenure track faculty (TTF) and teaching professors (TPs) for a variety of reasons ranging from formal administrative roles such as associate dean or center director to less formal leadership roles for the development of new programs, various types of administrative work, and projects. SOE policies remain unclear as to the criteria upon which course releases and administrative stipends are granted. In sum, course releases have been ad-hoc, individualized and sometimes inequitable; rather than systemic, transparent, and equitable. This contributes to feelings of distrust and inequity across faculty and unequitable teaching and service loads were named in exit interviews of faculty who decided to leave CU in recent years. This ad hoc system of determining course loads also puts stress on our scheduling staff who are continuously responding to individual program or faculty needs. A more centralized system of scheduling, connected to regularized teaching loads, is more efficient and creates a schedule that serves the whole school.

### A. Teaching Loads

We recommend that the School of Education develop and sustain practices for the equitable, transparent, and systematic distribution of teaching loads. We recommend developing principles and practices that acknowledge and compensate for differential teaching activities and opportunities in our school in a transparent manner.

- The SOE has a variety of field-based opportunities that are components of specific courses. These field-based opportunities offer students professional-level, practical experiences where students learn by working within the community. Sites for such experiences are typically in K-12 schools, within community organizations, in higher education offices, as well as in lower and upper division undergraduate courses at CU Boulder, where Learning Assistants (LAs) serve on the instructional team to implement the course. These field-based courses require more effort as the course instructor or field-support person conducts site visits and off-site observations of teaching in schools or within community organizations in both large and small enrollment environments. SOE created a [policy](#) in 2014. A new policy should be developed and expanded to include other field courses.
- Some SOE faculty members and graduate students (GTPIs) teach courses with large enrollments (30+ in the SOE), others regularly teach courses with small enrollments (as few as 6 students). While it is difficult to predict all course enrollments, program areas should plan for a fair distribution for the teaching among small and large classes among faculty and graduate students.
- Many program areas proposed creating new, larger, variable, and creative course configurations. This should be incentivized and done in a thoughtful manner that



considers teaching loads and in relation to the school as a whole (see below), how 1-2 credit courses fit into workloads, as well as opportunities for co-teaching courses, and supporting independent study offerings.

- Currently there is little clarity regarding a standard enrollment number in which a faculty would receive a Teaching Assistant. We recommend transparent thresholds for undergraduate and graduate courses, including where exceptions are made (e.g., for certain course types).
- Different modalities: Review and communicate clear policies and practices for how on-line and/or asynchronous courses count towards standard workloads and compensation for summer courses.
- There is little clarity regarding how “a course” is defined, and how courses that involve differential effort are differentially compensated, if at all. In some cases, 1 or 2 credit hour courses count for 1 course in faculty workload, in others, they do not. We propose that program areas consider and justify how many credit hours each course should count for towards a teaching load. The CU Boulder campus has clear [definitions](#) of course components and related contact hours: These guidelines include additional components to the lecture or seminar, such as clinical experiences, field studies, internships, laboratory, practicum, and recitation.

#### **B. Regular Course Rotation**

We recommend all faculty members, in consultation with program chairs and the dean, create a regular course rotation (to the extent possible). Ideally, faculty should be able to teach courses that reflect their choices, passions and connections to the School’s research identity.

- Teaching service courses on a rotating basis can help the School establish community, and build understanding of service activities of the school. These service courses could include the doctoral core, undergraduate courses, MA capstone, and practica.
- Program areas should be thoughtful, to the extent possible in planning for expected buyouts, sabbaticals, and course releases as part of course rotations. Course releases should not be used to remove oneself from the rotation of teaching service courses.
- This recommendation leads to cost savings as it is closely related with the recommendations regarding course releases and administrative workloads. Currently, the tenure track faculty (TTF) are teaching an average course load of 2.5 courses each year and teaching professors (TP) are teaching an average of 3.9 courses per year. Having more faculty teach courses in-load instead of adjuncts and GPTIs represents a potential cost saving, although we continue to value teaching experiences for PhD students.

#### **C. Centralized coordination of classes**

Currently, each program area proposes and to some extent schedules their own courses. Central coordination of which courses are being offered in a given semester, year (and cycle) can ensure that courses--and program areas--are complementing, rather than competing with each other. Staff and program chairs can develop regular practices for coordination. This would help avoid

issues of too many graduate courses being offered simultaneously and being less likely to meet enrollment. This also has positive impacts on doctoral program quality and time to degree.

- We recommend strong coordination and collaboration between Academic Scheduling and HR. Currently Academic Scheduling and HR use different systems on different timelines, which creates confusion and errors. Because of this, program chairs and centers sometimes do not inform both HR and course scheduling about appointments. Integrating timelines, processes, and systems is needed for accuracy and efficiency in course scheduling, instructor assignments, and instructor payments.
- We recommend developing clearer guidelines on when courses would be canceled, and by what criteria (minimum enrollment, necessity for degree programs) and how faculty workloads might adjust as a result. Currently, when courses are canceled, or canceled after the semester starts, faculty members often don't have a back-up course load. (Keeping in mind a few programs, i.e., MAHE, enroll many current campus employees, and need more flexibility on late enrollment).
- We recommend greater coordination around the development of new undergraduate courses. If each program area is offering many new courses--or planning to launch a larger undergraduate course--this will not be as effective in building enrollment as offering a few selective ones, coordinated to meet A&S general education requirements (or expanding courses and sections of courses that already do so). We should coordinate and pursue applying for more of our undergraduate courses to count for A&S general education. However, we should also be strategic (in collaboration with the Curriculum & Education Studies Committees) about applying to meet A&S General Education requirements (too many applications may be less likely to be approved than proposing a few, across areas). See additional related recommendations in "Course Configurations."

#### **D. Indirect Teaching and Advising**

Indirect teaching and advising does not fit easily in the tenure-track teaching workload of 40% teaching, 40% research, and 20% service (compared to teaching professors who have 10% of their teaching appointment dedicated to indirect teaching). It is possible that individual faculty members have found themselves negotiating reduced teaching loads to receive salaries and work conditions that they feel are commensurate with their effort and are competitive with their peers. In addition, faculty of color often have greater formal and informal advising roles compared to the school as a whole. We recommend finding clearer and more transparent ways to compensate faculty for additional teaching and advising responsibilities.

- One way this might be achieved is by changing the base teaching load for tenure track faculty to 3 instead of 4 courses per year, which would allocate 10% of workload for indirect teaching and advising. This might be more beneficial for certain faculty, such as those who provide extensive student support and advising, at either the undergraduate or graduate levels. One drawback is decreased buy-out funding. For instance, if a faculty member regularly buys out 2 courses per year, in this new load, they would only buy out

one, meaning less revenue for SOE. We recommend careful attention to the consequences when considering a change in workload.

- Another possibility would be to develop a service credit system — in use by many other peer universities — to “add up” or accrue time on advising (in a transparent and equitable formula) that translates to release time. For example, see this recent ACE report on “[Equity Minded Faculty Workloads](#),” that lays out potential examples and resources for such formulas, or [this formula](#) used by the University of Vermont to account for indirect teaching activities.

## Recommendation 2: Leadership and Administrative Roles

Many faculty take on crucial and important administrative roles in our unit: serving as part of our school’s leadership team, running programs, directing centers, coordinating field experiences, supporting instructors and doing outreach work in schools and communities. However, the SOE’s administrative expenditures outweigh those of other comparison campus units. For example, while CMCI has 4.2% of their continuing budget devoted to administration, the SOE devotes 9.9% of their continuing budget to administrative positions (information acquired from the Office of VCAA). While compensation for our associate dean appointments mostly align with [campus policies](#) other Tenure Track Faculty (TTF) and Teaching Professors (TPs) course releases and administrative stipends are individually negotiated at an ad-hoc basis, with little clarity regarding when a chair, co-chair, director, co-director, journal editor, etc. receive course releases and/or administrative stipends. A total of 14 of 33 TTF receive administrative stipends and/or course releases. A total of 22 course releases are associated with these 14 TTF in administrative positions in AY25 and these same TTFs receive approximately \$221,400 in administrative stipends. Also, a total of \$125,573 in faculty administrative stipends will be provided to 7 of 23 TPs in AY25. These same 7 TPs will receive a total of 30 course “releases” (in many cases, the role the TP was hired for did not involve a full TP teaching load). And yet, some programs such as TE do not have a representative on the leadership team.

### A. Leadership Team

- We recommend a careful review of all TP and TTF administrative positions to ensure that salaries are commensurate with experience and job duties and that all administrative stipends are appropriately and equitably assigned.
- We further recommend that all administrator job descriptions are reviewed and revised **annually** if necessary to reflect the nature of the job and its compensation. Some course releases and stipends continue beyond the administrative appointment, and in some cases, professional exempt positions or staff Director or Assistant Dean positions might be more appropriate job titles when most of the effort is devoted to administration.
- We recommend that an evaluation of the SOE leadership structure be conducted to ensure that all program areas and programs (e.g. Teacher Education) are represented. Also, we recommend that an evaluation of associate dean roles and responsibilities is conducted to determine the extent to which they are commensurate with the roles and responsibilities within other colleges and schools at CU Boulder, and with one another.

We recommend drawing on the Shared Equity Leadership model to analyze the current structure and to ground any proposed changes to the leadership team. See also the section on Teacher Education.

- The current 3-year appointment for Associate Deans has been difficult due to sabbatical interruptions and lack of long-term planning and collaborating with staff. In some cases, staff members find themselves spending much time educating new or interim Associate Deans. We recommend that Associate Dean terms are extended beyond 3 years and even up to 6 years. We further recommend that sabbatical leave be considered when offering AD positions. This will allow Associate Deans to collaborate with staff to create efficient and lasting processes and implement needed changes in the SOE operations more effectively.

## **B. Two Categories of Service**

The CU Boulder standard service load for both TTF and TPs is 20%. The standard merit formula for TPs is 70% teaching, 10% advising, and 20% service and TTF is 40% teaching, 40% research, and 20% service for TTF. The nature of this 20% service varies widely. In many cases, it consists in: service to the school (instructional innovation, committees, meetings), campus (e.g. campus committees, task forces, and initiatives), service to the community (e.g. after school programs, youth programs), and service to professional organizations (e.g. reviewing articles, serving on national and international boards and committees, including in leadership of scholarly organizations, as journal editors etc.), and service to the research field (e.g. tenure and promotion letters, mentorship). In others, explicit administrative responsibilities are allocated part of this 20% in the merit formula.

- We recommend that care is taken when hiring into the TPs explicitly for positions that are at least partially administrative, with one or two teaching responsibilities (as opposed to hiring faculty into teaching roles with a small bit of administrative service. When people are hired mostly for administrative roles, the SOE might consider the staff Director job code rather than an instructional job code.
- We recommend considering ways to distinguish compensated, administrative service from other types of service in our regular loads. This could help the SOE keep better track of how course loads, administrative responsibilities, are equitably awarded and negotiated. This way, the term “service” does not get used for so many things that it loses its meaning.
- Table 1 and 2 show the teaching, research, and service (T-R-S) loads for TTF and TPs respectively. The tables represent all current faculty and their AY25 loads. As is evident in the tables, there is great variation in course loads, representing director, co-director, executive director, assistant director, field coordinator, and co-chair positions.

Table 1. Tenure Track Faculty (TTF) course loads AY25 (merit formula) (n=32)

T/R/S	10/40/50	20/40/40	20/30/40	25/30/45	25/25/50	25/20/55	25/35/40	30/40/30	35/45/20	40/40/20
#TTF	1	4	1	1	1	1	2	3	1	17

Table 2. Teaching Professor (TP) course loads AY25 (merit formula) (n=22)

T/R/S	0/10/90	0/0/100	0/10/90	20/0/80	20/10/70	25/10/65	50/0/50	50/05/45	60/10/30	70/10/20	80/0/20	80/10/10	85/0/15
#TPs	1	1	1	1	1	1	5	1	1	1	2	4	1

- As also noted in the section on the research mission, we recommend that the SOE re-evaluate service obligations for faculty with the aim of reducing the overall service workload to encourage alternative activities (e.g., writing grant proposals, developing research agendas). We should re-evaluate what committees are necessary and how many people should serve, with an encouragement to trust decisions without requiring all program areas to participate. Our practice of ensuring representation from each program area on committees may sometimes be appropriate but may not be necessary for every committee.

### Recommendation 3: Creative Course Configurations

**Explore creative and strategic class sizes and configurations:** We recommend exploring creative and strategic ways to create and support larger courses and other course designs, across program areas. While this strategy will not result in short-term budget reductions (i.e., our FY25 budget is based on enrollment numbers from 2023), it will potentially support longer-term budget sustainability efforts.

#### A. Larger Courses

Where pedagogically appropriate and feasible, we recommend that our faculty explore how to offer some select larger courses. Not all courses will lend themselves to lecture-based formats, although some might, and might allow for creative discussion activities and smaller discussion sections. In some cases, these courses might be mid-sized (i.e. 40-50) and in other cases, even larger (i.e., 100-150) that could be supported by teaching assistants and recitation sections. We recommend strategic and careful experimentation with increasing course sizes, with more support to faculty to develop lecture-based course modalities, professional development to support high quality instruction and interaction in larger courses (i.e., flipped classrooms, clickers, structured discussion activities, etc.). Here, we recommend experimentation with different infrastructures and technologies that might support larger classes, including the use of teaching assistants and learning assistants, as well the use of AI-assisted grading, where appropriate. In all cases, we should evaluate the usefulness of different configurations and structures, with an eye to ensuring robust and meaningful learning opportunities for students.

- We recommend starting by experimenting with larger sizes for some of our existing courses with high enrollments, and with courses that already meet CU [General Education](#) distribution/curriculum requirements. These courses might be more likely to draw in higher numbers of students.

- For example, we might explore offering a larger lecture version of EDUC 3013, “School and Society” with an enrollment of 125-150, that could be taught (or even team taught) by faculty and supported by graduate students leading weekly recitations and assisting with grading. This might also offer a supportive mechanism for first-year PhD students to learn the 3013 curriculum before teaching a course on their own. Some existing undergraduate courses — including History of Education, Foundations of Leadership, Education and Film, Energy and Interactions, and Children’s Literature — might also lend themselves to larger formats.
  - Many program areas proposed creating new larger undergraduate courses. Many of the suggested topics are exciting ideas. We recommend developing a thoughtful method for approving potential courses, and helping faculty members apply to have courses recognized by A&S (as meeting Gen Ed Distribution/Diversity requirements). We also want to caution that we need to develop centralized processes for scheduling courses; offering too many large courses at once may result in courses competing against one another.
  - In all cases, both undergraduate and graduate, and both large and small courses, there needs to be central scheduling and planning across program areas, to ensure that a thoughtful mix of courses is offered each year.
- B. Additional sections:** For high demand courses, or courses that quickly fill up, we recommend exploring ways to add additional sections of these courses. Where possible, more faculty might teach these courses “in load,” so that additional sections do not depend on available GPTIs (and generate additional costs for GPTIs or adjunct salaries).
- C. Expanding additional course modalities:** We also recommend offering additional sections in different modalities, where feasible. For example, the sections of LEAD 1000 are consistently full each semester. When all sections are full or overenrolled, we’ve had a practice of opening an asynchronous section. These asynchronous sections fill relatively quickly and at a higher enrollment cap. Similarly, remote or asynchronous sections of 3013 offered in the summer are in high demand; we might offer more sections of these courses in the fall and spring, subject to enrollment.
- D. Consider increasing enrollment caps:** Where pedagogically appropriate and feasible, we recommend that faculty consider increasing the enrollment of certain courses. We recommend that faculty carefully review optimum, minimum, and maximum sizes for undergraduate and graduate courses. (Also see related information on ideal course sizes and sections of courses in the Teacher Education/Undergraduate Education document). For instance, 3013 had a previous enrollment cap of 30-33 students in each section. In Fall 2018, that enrollment cap was reduced to 25 students in a section. Many other courses in the School of Education modified their enrollment caps in response. While 5 additional students may not—by itself—result in huge budget savings, such moves do add up. For example, using FY24 figures, each undergraduate

taking a 3-credit course results in \$754.72 in college of instruction (COI) revenue. While these numbers vary each year, we could estimate that the College of Instruction (COI) revenue generated by increasing enrollment from 25 to 30 across all 32 sections of EDUC 3013 offered in a year would be a difference of **\$121,000** each year. This chart offers a quick comparison:

Enrollment in 3013	25	30
COI Revenue (per each 3-credit course)	\$18,867.75	\$22,641.30
COI Revenue (across all 32 section)	\$603,768.00	\$724,521.60

- E. Building summer session enrollment:** Currently, the School of Education offers few summer courses. The new budget model makes it advantageous to run certain courses in the summer terms. However, we should be thoughtful about which courses—and which modalities—to offer; in the past, several summer offerings have been canceled due to low enrollments.
- We recommend that clearer guidelines for offering summer courses be developed, including better estimates of what courses should be offered, how to incentivize student enrollments, and earlier deadlines for when a summer course must be available for student planning (summer session surveys indicate that students who complete summer coursework start planning in the prior November).
  - We recommend exploring the possibility of faculty being able to offer a summer course (pending enrollment cutoffs) as part of their teaching load (pending policies and restrictions on that practice).
  - We recommend offering more of the courses run in the summer with an asynchronous modality when appropriate. During summer, the demand for online courses has risen not only in the School of Education, but campus wide. Forty-six percent of courses offered across CU Boulder during the 2024 summer term are online (compared to 20% in 2019), and 84% of School of Education courses offered in the 2024 summer term are online (compared to 10% in 2019).
  - In addition, many graduate students are seeking summer funding opportunities; offering additional sections of popular undergraduate courses may help us provide more competitive graduate funding packages.
- F. Cost benefit tools:** We also recommend that School of Education leadership develop clear and transparent tools to show some of the cost-benefit analysis of offering courses at various enrollments and offering additional sections of various courses. (As well as the costs and revenue generated by additional — or fewer — cohorts in different programs). Such tools would help faculty, staff and program areas make decisions, and weigh potential trade-offs in designing courses and enrollments. We recognize that these calculations are complex and would need to account for (a) varying instructor costs, and (b) infrastructure costs that support courses (i.e., scheduling, advising, TA support).

## Recommendation 4: Undergraduate and Teacher Education

Build a clear and sustainable infrastructure to support undergraduate education. The revenue generated by courses and programming within undergraduate and teacher education in the SOE is substantial, totaling over \$5 million in tuition revenue (see appendix B). Though some progress has been made, there is still a need to define and shore up a sustainable and cohesive infrastructure for our diverse undergraduate and teacher education programs. For instance, when the Elementary BA program (our largest BA and Teacher Education program) launched in 2018, the program did not receive any additional, accompanying resources for the critical work of building a program that serves a need in our state other than — anecdotally — a few course releases for tenure track faculty to shoulder the time-intensive work of establishing a high-quality BA program with both an initial teacher license and CLD endorsement.

Overall, the undergraduate population of students in the SOE is substantial, with a notable amount (9,000 approximately; see appendix B) of undergraduate student credit hours earned by CU Boulder students pursuing BA programs outside of the School of Education. When looking at all students across all programs and undergraduate, post-BA, *and* graduate levels in the SOE, teacher education students also comprise a bulk of our student population, 63% (n=410, appendix B) in Fall 2023. With such large numbers of students, it may be more important to ask what *additional* resources these programs need, not what fewer resources.

The undergraduate and teacher education programming is not as cohesive or consistent as a flagship university could offer, giving students across programs an uneven experience in the School of Education. Fortunately, we have had a stable Advising office for the past several years, which has helped to ensure School of Education students know about their program requirements and can be set up for success towards meeting those requirements. Yet many of the undergraduate and teacher education programming needs are beyond an advising office's scope.

To ensure more efficient, sustainable infrastructure for our many undergraduate and teacher education programs, we recommend:

### **A. Create centralized leadership for Undergraduate and Teacher Education.**

Our School needs centralized leadership for our undergraduate and teacher education programs in order to provide a cohesive and sustainable infrastructure for the programs. This can take various forms, including two new Associate Deans — an Associate Dean of Undergraduate Education *and* an Associate Dean of Teacher Education, or a combination of an Associate Dean, Assistant Dean(s) and Director(s). We support the Teacher Education proposal for reorganization, and its priority of a teacher education representative within the School of Education leadership structure, noting that the leadership team may consist of representatives from all ranks, including assistant deans, where appropriate.



We have some hesitancy in combining all of teacher education with all of undergraduate education under one leadership role given the size and scope of teacher education (e.g., Masters students, state licensure, district partnerships) and variation in undergraduate education (e.g., two majors, two minors, one certificate that are not teacher education). Yet, we also recognize that the largest undergraduate program is indeed a teacher education program and that the larger aims of the Associate Dean role(s) are to align and strengthen academic services and student support for our undergraduate and teacher education programming.

**Overall responsibilities would include strategic visioning and allocation of resources for undergraduate *and* teacher education, along with coordination and a reporting structure for entities responsible for the undergraduate and teacher education experience** (see appendix C for a list of responsibilities). It is important to note that if specific responsibilities are not with the Associate Dean(s) then these responsibilities must be written into — and compensated for — in another faculty or staff role.

**B. Invest in program improvement and deepening partnerships.**

The Teacher Education Program Chairs and Directors submitted a proposal for leadership to review, and as we indicated above, we support its recommendation for an Associate Dean and its reorganization for a more optimal and efficient leadership structure. A component of the proposal is redistribution of responsibilities and compensation, though there is a cost *and* multiple needs. Elementary Education having a director working alongside a faculty chair, for instance, would offload the administrative components of running the program and free up other faculty (TT and teaching) to teach more courses, which would benefit the program. In addition, there are additional administrative tasks back in Elem Ed (e.g., growth plans, liaison with disability services, recruiting events, student survey development and analysis). Depending on the central leadership structure, we may also be able to share more of these responsibilities across programs (e.g., survey development and analysis). As mentioned in the section on leadership and administrative roles, the clarity (and reducing duplicate roles) is vital for financial resiliency.

**C. Make decisions about the size and scope of programs transparent.**

It is imperative that we follow through on commitments and ensure adequate infrastructure for our undergraduate and teacher education programs. As a flagship university for our state, we must keep ‘quality over quantity’ at the forefront and stop taking shortcuts to run high-quality programs that make a transformative difference in communities and schools. Decisions about size and scope of programs can also be made transparent, grounded in budget trade-offs, and made with those who are affected most. It is not clear, for example, why the Elementary BA program has a target size of 75 students per year, starting with 90 students in the initial year. Some faculty have also asked for a cost-benefit analysis of having just 50 students, and similarly faculty asked to learn more about an optimal (and minimum and maximum) class size; see the section on creative course configurations). We began a rough calculation of such costs finding that there was a semester when programs may have lost COI revenue unintentionally with a

cohort - though they continued to generate COR and retention revenue. To be more financially resilient, SOE Leadership and HR should work with program chairs to determine the monetary and resource costs of program enrollment and course section sizes.

**D. Develop consistent funding and an annual budget for Undergraduate and Teacher Education.**

Currently, some undergraduate programs have budgets that directors or chairs manage, while other programs have sparse or no budgets for an array of services, whether small events or larger expenses. We need a system for budget submission, and need to be able to make decisions to best allocate resources across teacher education (and undergraduate education). Where appropriate and feasible, give units and programs a better understanding of their individual and shared budgets and build in some discretionary funding. This will provide programs with agency for making strategic decisions for allocating resources. Significant resources, for instance, are dedicated to the professional support and stipend costs for the 200+ mentor teachers in our partner schools who host teacher candidates throughout their BA and licensure programs. We need to know if there is a consistent, reliable funding stream for these expenses, and we support the [Mentor Proposal](#) for working with the Development Team to ensure a more adequate compensation structure for the important work of mentorship.

**E. Establish strategic coordination and collaboration for recruiting and welcoming events for Undergraduate and Teacher Education students.**

Overall, there is a need to be more efficient and strategic with faculty and staff time, and recruiting and welcome events are one example of ways we can shore up our systems. Decisions and priorities for recruiting and welcoming events appear ad-hoc and are often run separately by different units. One remedy is a centralized calendar that lists the events by purpose and estimated numbers of attendees, as well as coordination of program participation. Furthermore, we can be more efficient with time and resources if we decide ahead of time who is attending which event and if it would be possible for one person to represent various programs.

**F. Invest in software**

We need better software to comprehensively manage the databases for the professional licensure components of our programs. We recommend one of two options: 1) to proceed with Tevera licensing at the cost of \$28,000 per year for 3 years, launching with students in January 2025; or 2) to invest in building our own software with university graduate students and faculty under the guidance of the people who will use it most in the SOE, launching with students in August 2025. We endorse [the proposal](#) put forth by the Office of Teacher Education. However, we want to proceed judiciously by ensuring that we first speak with other universities who are using Tevera for teacher licensure and by developing and confirming the scope of work and timeline with the university graduate students and faculty who can build our own software internally. It may also be possible that we begin using Tevera, and during those initial years, work with the internal development team to build, test, and revise a customized software that we use in subsequent years.

No matter which route we take, the financial costs of the software will be offset in other ways, including reducing inefficiencies and freeing up time spent on managing spreadsheets and communications regarding field placements and teacher licensure.

**G. Strategically grow undergraduate majors and minor programs.**

While the vast majority (87% - see Appendix B) of our undergraduate majors are in Teacher Education, there is room for growth in our other undergraduate programs: the [Leadership and Community Engagement \(LDCE\) major](#), [Leadership Minor](#), and [Education Minor](#).

- The LDCE major and Leadership minor have been developed and housed within CU Engage, coordinated by their faculty and staff, and funded by their center’s budget. This major and minor generate significant credit hours (see appendix B), as well as COI and COR revenue annually. Decisions about how to continue supporting CU Engage, and their faculty and staff, are also decisions about how to support these important programs. We recommend that the SOE be cautious about losing important academic programs that are also linked to tuition-based revenue models.
- See this [report](#) for an overview of current efforts, and ideas for how to grow and improve the Education minor.
- In addition, our new [Educational Studies](#) major — starting in the Fall 2024 term — is currently small, but also has potential for growth.

In all cases, however, we must make sure that growth in programs is intentional, and combined with the infrastructure (i.e., admissions, advising, coordination, leadership, available instructors and space) necessary to support that growth and ensure high quality student experiences. See the section on Teaching Loads.

## Recommendation 5: Graduate Education

While our committee has considered several ideas related to graduate education, we have reservations regarding whether these changes would result in savings, and/or whether they align with the SOE’s teaching and research mission. We recommend the following ways to continue and improve practices for graduate education in cost-effective ways that meet students’ needs and support the SOE’s mission in the long-term.

**A. Carefully consider PhD admissions offers in relation to projected assistantship options.**

One approach to budget sustainability might be to accept smaller cohorts of PhD students each year. The projected cost of funding a GRA in AY 24-25 is \$43,690, increasing to \$49,173 in AY 28-29. Estimated savings: \$231,955 saved for each fewer student, as projected for 2024-2029

	GRA Rates: Project Cost/AY					
	AY24-25	AY25-26	AY26-27	AY27-28	AY28-29	Total
<b>50%</b>	\$43,690	\$45,000	\$46,351	\$47,741	\$49,173	\$231,955

This is not a straightforward calculation, as the “costs” associated with graduate students are also related to revenues from teaching and research, not to mention that graduate student education is a core part of the SOE’s mission. The percentage of admitted students who accept their offers, and therefore the enrolled student cohort size, has also varied over the last decade, indicating that changes to cohort size within a small range may be difficult to control (see Appendix D).

**Other considerations to inform decisions about PhD cohort size include:**

Funding for many graduate research appointments comes from grants. If aiming to reduce PhD enrollments, we recommend that the leadership team analyze data regarding the percentage of PhD research appointments that are funded by external grants vs. the SOE budget.

- Funding a GPTI (\$11,750.90 for one semester, including tuition benefits and fringe) is more costly than a lecturer (\$7,302.50 including fringe). However, graduate instructors are embedded in the SOE’s community, research, and mission, which positions them to provide instruction that aligns with that of faculty members. Providing these teaching opportunities to graduate students is also an essential part of their training.
- Based on data we have reviewed (i.e., number of undergraduate courses taught by GPTIs), and the experiences of committee members and input from others in the SOE, it does not appear that teaching/research appointments are being created solely to fund students. Rather, the work is available, and we do not seem to have more PhD students than assistantship work. If we create larger undergraduate course sections, and therefore have fewer GPTI opportunities, there might be budget savings associated with smaller PhD cohorts.
- Smaller PhD cohorts can have negative impacts on the quality of graduate education, and on the professional community within program areas and in the SOE as a whole. Where PhD cohorts are smaller due to fluctuations in advising capacity and acceptance of admissions offers (for example, the incoming cohort in 2024), this may result in short-term budget savings, but this is likely not a reliable or sustainable source of savings.

**B. Audit PhD funding offers in comparison with AAU peers and implement practices that provide equitable PhD student experiences and support degree completion in 5 years or sooner.**

While we were not able to complete a detailed survey of funding at peer institutions within the scope of this budget committee, we recommend that the leadership team and/or faculty members audit the PhD offers that are common among our AAU peers. Funding packages play an important role in budget sustainability and the health of the SOE over future years, including the ability to recruit PhD students and to provide humanizing, financially viable support relative to our area’s cost of living.

We also believe that structures to support on-time degree completion benefit the SOE budget and students themselves; this also could be a draw for some students who want to ensure they

finish without excessive delays. We recommend that the leadership team explore what percentage of PhD students beyond the 5th year are funded by graduate appointments as opposed to finding work outside the SOE, and implement practices to support degree completion in 5 years or less:

- Create and maintain infrastructure for planning, coordinating, and sharing PhD assistantship opportunities, and consider GPTI teaching loads (see teaching loads/course configuration recommendations). There is wide variation in the work demands and content of PhD experiences, and individual program areas may not be able to predict teaching and research opportunities for the next five years. Communication between program areas might lead to both projections for funding availability and more diverse PhD opportunities. Some committee members support a limit of one GPTI appointment per semester where possible (0.25 teaching, 0.25 research).
- An approach that might have a marginal budget impact while improving PhD student funding is to increase post-comps RA pay, which is somewhat common across campus and would be funded through grants. This could mean that pre-comps RA pay is equal to TA pay, and post-comps RA pay is equal to GPTI pay. This adds another layer of complexity to assistantship contracts but might also encourage a variety of PhD experiences across years in the program.
- Mixed committee support: Where possible, fund a 25% assistantship for work with faculty advisors in Year 1. We acknowledge this is an additional cost and may not always be possible, but the practice is supportive for first-year students and can ease the burden on faculty who want to admit a student but are still exploring immediate funding opportunities.

**C. Build and support MA programs with sustainable funding sources, particularly those that support local and rural practicing educators and professionals.**

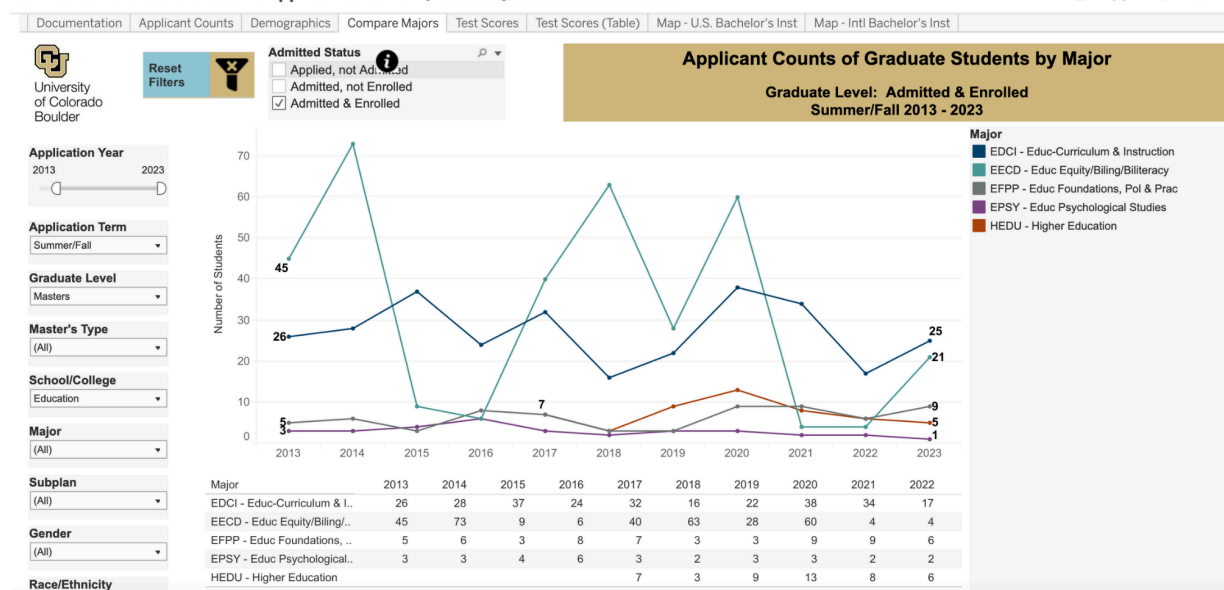
We noted the very different budget impacts of MA and PhD students, and their different roles in the current budget situation. For example, MA enrollment numbers have varied in recent years, especially as BUENO Center teacher training grants vary (see [chart below](#)). We also recognize that the details of BUENO Center funding are complex, and we make recommendations with care.

Fall 2020: 123 new MA students enrolled

Fall 2021: 57 (source of FY23 budget)

Fall 2022: 35 (source of our FY24 budget)

Fall 2023: 61 (possibly increasing the FY25 budget)



#### D. Continue high-impact grant-funded programs

Our MA programs that support local teachers — and teachers throughout Colorado—are a central and visible part of the School of Education mission. In particular, BUENO has trained hundreds of bilingual teachers throughout the state. While their MA numbers have varied—in part because of changing federal rules for training grants — we recommend working with BUENO to develop creative partnerships and other funding streams to support this vital work.

#### E. Build MA enrollment

In other cases, existing MA programs — in LSHD, EFPP, MAHE and other programs — could benefit from additional, centralized resources to recruit students, particularly in Colorado, where our enrollment yields are higher. An investment in more resources for marketing programs to in-state professionals might help programs build enrollment. A short-term cost could lead to greater budget sustainability over the longer term. This could involve restructuring/adapting or diversifying existing MA programs.

#### F. Additional ideas regarding graduate education that were considered by the committee

- We considered the possibility of guaranteeing PhD funding for 4 years instead of 5.
  - There may be budget savings from shorter degree completion time, but only in coordination with cohort size and the availability of assistantship funding. This timeframe may be appealing to some PhD students, if accompanied by practices that support students toward faster degree completion (i.e., course offerings each semester, comps timing, summer funding). It might be difficult to graduate in four years while working 50% time, but more possible if students worked less. It also would have negative impacts on the competitiveness of our funding offers and our ability to recruit students nationally and may be unrealistic for some

students. In addition, advanced PhD students are often those most capable of supporting research grants or teaching courses, which fund the student in a cost-effective way.

- We considered an approach that would equalize pay for GRA and GPTI appointments.
  - This could be accomplished by increasing GRA pay to equal GPTI pay, which could increase compensation through grant funding with less impact on the SOE budget. However, it might present a budget challenge when it comes to TA appointments, including field coaches. We also recognize the time and effort of GPTI appointments.
  - Another benefit to this that we have considered is efficiency and predictability of PhD contracts. However, since graduate funding will always come from multiple sources in the SOE, individual contracts and separate payroll entry of RA, TA, and GPTI contracts will still be necessary.
  - See idea above re: increase to post-comps RA pay.

## Recommendation 6: Research Mission

Protect, invest in, and cultivate the research mission of the SOE. While the new budget model incentivizes focusing on course and program enrollment, the research mission is a central part of our School of Education. It is tied to our national reputation and research funding makes up a significant portion of our total expenditures. Restricted grant and contract expenditures made up ~29% of total expenditures in FY23, and between 25% and 52% during the period FY15 to FY23<sup>4</sup>. We recommend the school's budget prioritize *both* areas of teaching need and research strength, in future resource allocations, and make the following recommendations:

### A. Continue to invest in tenure-track faculty positions that support its research mission

By prioritizing credit hour generation, the new budget model may incentivize replacing tenure track lines with teaching faculty lines. However, faculty with nationally recognized research expertise are instrumental in developing and teaching courses, mentoring graduate students, coordinating research projects, and securing external funding. We acknowledge tenure-track vacancies represent a significant source of budget savings but recommend that vacancies be seen primarily as an opportunity to re-evaluate programmatic research and teaching needs. The evaluation of these needs may take time, and thus generate temporary savings that can contribute to stabilizing the school's budget, but the need for reflection and strategic

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<sup>4</sup> FY24 expenditure data was not available for the committee to review because the fiscal year 2024 has not closed yet. These percentages are based on data shared with the committee by the leadership team. The percentages include restricted contract and grant spending in both SOE & BUENO (which have separate org numbers), but do not include gift funding or auxiliary funding that supports research and outreach/service activities (which the committee is aware has replaced some restricted grant & contract funding within the last five years). The percentages also include subawards issued to other universities, which can be significant, vary year to year, and does not necessarily represent support for the school's research in the same way.

adjustments, not savings, should be the primary driver of holding positions vacant. Factors that should be considered when refilling a tenure track position should include:

- What is needed to balance workload within and between program areas?
- Does the program area have the capacity to support PhD students via course offerings and advising of teaching and dissertation responsibilities?
- The potential or historical record of bringing in external funding and managing an active research program.

**B. Protect research activities of faculty by building in advising and student support to faculty workloads, if applicable.**

Currently, differential advising and indirect teaching loads are not supported in TT faculty workloads. Alternative teaching loads and service credit systems are further discussed in the Teaching Loads section (sub-heading D) of the document. Such changes would also support the research mission of the school.

**C. Re-evaluate service obligations for faculty with the aim of reducing the overall service workload to encourage alternative activities** (e.g., writing grant proposals, developing research agendas). We should re-evaluate what committees are necessary and how many people should serve, with an encouragement to trust decisions without requiring all program areas to participate. Our practice of ensuring representation from each program area on committees may sometimes be appropriate but may not be necessary for every committee.

**D. Develop a set of principles that support the success and fiscal sustainability of research centers<sup>5</sup>**

- Currently, there is variation in how much centers are supported through SOE resources such as course releases or salary support. Some of this support may be historical and may no longer represent a strategic investment.
- Leadership should assess the support that is currently provided across centers and work with center directors to develop plans that correct inequities and allocate support strategically.
- Leadership should acknowledge each center's unique needs for stability and identify clearly what kind of "rainy day" assistance can be expected<sup>6</sup>.
- When new centers are supported by the school, it should be clearly articulated what kinds of start-up and/or continuing funding they should expect.

**E. Support and recruit research faculty with a track record of bringing in external funding.**

Research faculty who bring in external funding can provide important opportunities for faculty collaboration and graduate research assistant support. Some early career faculty and faculty with heavier teaching and service obligations may benefit from opportunities to be Co-PI's on research projects led by research faculty.

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<sup>5</sup> "Research centers" refer to both official and unofficial centers in SOE that are not focused around courses run through the university. This may also incorporate centers focused on community outreach work that is not "research" but is funded primarily by external sponsors.

<sup>6</sup> Members of the committee have anecdotal evidence that centers currently seek to "hoard" funding or support in a variety of ways that may not benefit the center or school as a whole.



- F. Allow PI's to retain a portion of their DA-ICR<sup>7</sup>.** This echoes a recommendation made by the Provost in the 2023 ARPAC report and is practiced by other campus units. While this would diminish the school's central DA-ICR budget, it may encourage faculty and centers to pursue grants with higher indirect costs. In addition, it could potentially provide some degree of autonomy and stability to centers and research faculty by allowing them to accumulate discretionary funds (tying into the recommendations around supporting research centers and research faculty above).
- G. Develop an internal policy or guidelines around course buyouts.** Course buyouts (CBOs) are an important part of our temporary budget that should be encouraged. The policy/guidelines should make clear the difference between a course buyout and a course release<sup>8</sup> and (1) articulate the rationale behind the school's course buyout rate<sup>9</sup>, as well as (2) lay out how instructors or teaching track faculty can buy out courses to work on research or other programmatic projects<sup>10</sup>.
- H. Invest in research support and infrastructure.** Given that external research funding is a significant part of our overall budget, we should invest in resources to sustain and grow our capacity to secure and manage external funding. Leadership should encourage and help facilitate research collaborations across program areas.
- I. Centers of excellence.** An additional idea that surfaced during committee discussions but that the committee could not reach full agreement on how to phrase was the idea of collectively identifying and investing in "centers/areas of excellence". These may include centers/areas in which the SOE is nationally recognized for research expertise, as well as areas that are consistently successful in securing external funding. In many cases, research strengths are visible through research centers, in other cases, through allied research interests of faculty, or through outreach and engagement work. Faculty recall this practice taking place in the past. Given the shifts and changes in the SOE in the last decade, it may be useful to re-evaluate areas of research strength. Identifying strengths may be useful in helping our faculty prioritize *both* areas of teaching need and research strength, in future resource allocations.

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<sup>7</sup> The Departmental Administration Indirect Cost Recovery (DA-ICR) program was designed to provide general fund support to units in proportion to the indirect cost recovery generated from a unit's sponsored project activity.

<sup>8</sup> The purpose of differentiating course buyouts and course releases in the policy or guidelines regarding course buyouts should not be to define when course releases are granted (which is a separate issue). Rather, our committee recommends this for the purposes of transparency and increasing shared understanding of budgetary practices. Some committee members noted that the terms are used interchangeably by faculty within the school, suggesting the difference is not always clearly understood.

<sup>9</sup> The school's current course buyout rate is 15% of a faculty member's academic year contract. However, a course is only associated with 10% of a faculty member's load. Any new policy needs to be clearly on how the rate relates to effort and be reviewed by the Office of Contracts and Grants for compliance with federal grants and contract rules.

<sup>10</sup> Research and outreach work in the School of Education provides unique opportunities for teaching-track faculty to participate. This needs to be formally encouraged and supported.

## Recommendation 7: Campus Funded Programs

The School of Education has centers and programs that were funded in part by central campus entities (Provost or Regents). In most cases funding has been stopped (AQE, CADRE, MATL), is winding down (CU Engage), or has been reduced (LA). There are several implications to these reductions in funding. CU Engage and the MATL program could potentially run deficits that would exacerbate SOE's current budget situation. Both programs are poised to contribute to future revenues and growth.

- A. **We recommend that SOE Leadership work closely with MATL, CU Engage, and the LA program to create a plan that ensures each program and SOE's long-term budget sustainability.** We encourage thinking expansively about how this might be done, including internal reorganization within SOE, or shifting part or whole of these programs to other units.
- B. **In addition to these three programs, we recommend that the SOE Leadership team work closely with all programs and centers to determine equitable funding distribution from dean's gift funds, course releases, etc. and these should be periodically reviewed.** This support should be strategic leading to the long-term resilience of these programs and centers that are well aligned with the SOE mission. More transparency about who gets what from where, whom, and what kind. Better communication.

While these programs required initial investment in implementing ideas and revising them, the long-term payoff is through contributions to the budget sustainability and identity of the School of Education:

- Cutting edge research on policy, education, learning, cognitive science, and teaching.
- Authentic learning and career experiences for undergraduate students in schools, colleges, and within the community
- Online opportunities for teachers and community members to earn “choose your own adventure” stacked certificates toward a CU Boulder Master of Arts in Teacher Leadership (MATL) degrees.
- MATL has created an online infrastructure that other programs in SOE can use to extend their reach to new populations of students.
- Opportunities for undergraduate students (Learning Assistants) to experience campus connections and leadership by participating on instructional teams of courses throughout the university, providing more accessible and inclusive learning experiences.

Each program has provided information to inform SOE leadership and be the basis for working together towards sustainability. See appendix E, F, and G for descriptions of CU Engage, the Learning Assistant Program, and the Master of Arts in Teacher Leadership.

## Recommendation 8: Organizational Structures and Budgetary Practices

We recommend that the SOE continue to explore ways to develop clearer, streamlined organizational structures and processes. We also recommend small changes to budgetary practices, and broader efforts to build shared understandings about the budget.

- A. **Improving organizational processes and locating efficiencies:** The SOE is currently working with C-Shift, an external consultant, to map out staff roles and organizational practices in our unit. Because of this work, our committee did not focus on this area in our research. At the same time, we note that the 2022 ARPAC report identified that the growth in the number of professional staff positions may be incommensurate with program growth. In the reporting period (2014-2021), there was an 150% increase in the number of “university staff” classified positions in the SOE (from 18 to 45). While many of these positions provide crucial support for programs and centers, the increase in staff--and long-overdue raises for staff across the university--mean that staff salaries and benefits represented 22.6% of our core budget in FY24 (compared, for instance, to 54% for tenure track and teaching faculty). Some part of this increase also has to do with the new education major, and the staff needed to support it. While we value our administrative, programmatic, and student support staff, this rapid growth (along with continued organizational challenges) supports a careful re-evaluation of our practices. While the technical analysis is being conducted by an external contractor, we recommend that staff and faculty be brought into conversations about how to create an efficient and effective administrative support structure. We also recommend that the search for the permanent dean prioritize a candidate who is an effective and experienced manager of central administrative staff and processes.
- B. **What might be centralized?** As the SOE learns more about recommendations from C-Shift’s review of staffing, we recommend facilitating conversations about what kinds of services and supports might be better served by centralized (into central campus offices) and which ones it makes sense to keep “in house.” Our own staff offer key advantages, but also can be more expensive. Historically, the SOE has maintained its own support staff for key areas (i.e., HR, budgeting, scheduling, events, etc.) while also relying on the central campus for other assistance (i.e., proposal development, legal/contracting, etc.). In concert with C-Shift, and the emerging HR Blueprint initiative, we recommend careful decision-making, with appropriate staff and faculty, about which services are best kept “in house” and which might be productively centralized. Such conversations should consider what compromises in service might need to be accepted if we choose to utilize centralized services.
- C. **Investing in systems and processes:** As part of these efforts, we recommend investing and reimagining some of the key systems that support key functional areas in SOE. As appropriate, this may include efforts to use databases and software, such as project management systems in which help tickets are issued to log and fill requests, rather than relying on email. We also note that—in some cases—fewer more experienced—and better compensated staff—may also be more effective than adding multiple entry-level positions. We also considered processes to simplify graduate student appointment processes but did not endorse ideas to level funding across GRA, TA and GPTI positions. Different types of appointments are required to be set-up under different job codes and are tied to specific speedtypes, and so would continue to need separate appointments.
- D. **Budgetary practices:** In our review of the budget, we noted that almost all temporary funds are needed to cover ongoing expenses. While the distinction between “continuing” and “temporary” funds has changed to “core” “and temporary,” we nonetheless recommend more caution in using temporary funds to support ongoing,

permanent staff positions. While we can reliably count on some measure of temporary funding, we also would like to see more budgetary caution in using these funds. The 2022 ARPAC report noted that pandemic-related temporary reductions in operating expenses supported a “permanent increase in staff, a rather risky budgetary practice.” In addition, we note that units should maintain a small, but important budgetary reserve for use for “rainy days” or to cushion better/worse years of temporary funding or external awards. While difficult to do in times of budgetary stress, this is nonetheless an important practice to prioritize moving forward.

- E. **Clear MOUs and funding agreements:** When the SOE receives commitments from central campus, we recommend that these commitments be formalized in clear MOUs with agreed upon timeframes. In the case of CU Engage, the changing budget model--and the draw-down elimination of a pool of centralized Provost funding — left the center vulnerable, in spite of historic commitments to ensure that the SOE would not be responsible for funding this center. In the case of MATL, clear timeframes and funding commitments from campus were not upheld. This meant that part of a planned-on grant funds from the Regents ended.
- F. **Transparency and shared understanding:** We also recommend engaging our faculty and staff in discussions about the budget, investing in our collective capacity to work towards budget sustainability. Here, to the extent possible, allowing programs and centers to understand their own budgets — and have access to some discretionary funding — would be helpful. While we caution against models that would give every program the responsibility to generate its own revenue, greater budgetary transparency would help us make collective decisions.

## Recommendation 9: Continue to advocate for changes to the campus budget model

We first acknowledge that the budget model is not going away; careful, strategic advocacy for specific changes will be more effective than calling for large-scale overhaul of the model, or a full rejection of it. But we need to strategically advocate for crucial changes that disadvantage our unit particularly, and think about how to make this case. We suggest a few priorities:

- A. **More equitable funding of required merit/salary increases:** Our SOE receives a “share” of the campus-wise merit pool, roughly in proportion to our tuition share (i.e., 2% of the whole). This share does not cover the actual cost — and expected costs moving forward — of our required cost-of-living salary increases and merit increases. CU could separate this process to adequately fund the actual (and required) HR requirement/need rather than through our inadequate unit share. This is a huge — perhaps even the primary — driver of our increasing deficit over time, and requires attention and action.
- B. **More equitable and fair counting of majors and minors:** Currently, the budget model assigns one major as the “primary” major, and the other as the “secondary” major. Thus far, many of our SOE majors have been assigned the secondary role, with less assigned revenue for a student’s “college of record.” This includes all SOE students pursuing a double degree; all LDCE and MHST

students are not counted with SOE as their primary college of record. This also includes other students pursuing a double degree, including some of our Elementary Education students. We should advocate for clearer and fairer allocations of how double-degree seekers are counted (and assigned “primacy”). In addition, this is often unreflective of many of our majors, who have more extensive advising needs for teacher education (compared to their content-area major in another college). Minors also receive a proportion of COR revenue (.25), but we are unclear how this is divided for students with more than one minor. Our minors represent an important area of revenue and growth, and we should clarify how they might be counted.

- C. **Reconsider supplementary funding allocations:** Supplementary funds were determined by looking at one year of data from each unit, and then assigned, in addition to tuition revenue, to bring units “back up to” their funding levels. Unfortunately, using just one year of data meant that our unit looked proportionally stronger than we are (we had a good year for student numbers in 2022, when supplementary funding numbers were set). But since then, our supplementary funding has not changed, and new campus guidelines stipulate that supplementary funds will only vary between +/- 5% each year. We recommend reevaluation of how these original numbers reflect actual needs of units, and ways to request variances to the 5% limit.
- D. **Strategies for replacing centralized funding:** The loss of centralized Provost funding for key programs (CU Engage, LA and others), and the newly required need for the SOE to absorb these costs in our unit budget, is another key challenge. We recommend advocating for changes that would allow us to ask for additional supplementary funding to support these programs, or opening up other ways to support campus-wide programs that might be housed in particular units, or moving relevant campus-serving programs to other centralized units on campus. Relatedly, we should work to develop and articulate (as a unit and campus) a better understanding of “campus goods,” and support for interdisciplinary and cross-college programs that serve the entire university. Clearer funding streams for such programs would support our education and service missions as a university.
- E. **Connections to the dean search:** We recommend that our search for a new permanent dean prioritize prior expertise with unit-based budgeting, and ability to successfully engage in the kinds of strategic campus advocacy to effect key changes in the model.

## **Appendix A**

### **Description of Budget Committee and Activities**

The Budget Committee (BC) consisted of the following members (in alphabetical order):

- Travis Anderson, Assistant Dean of Academic Programs and Planning
- Oded Gurantz, Associate Professor
- Roudy Hildreth, Executive Director of CU Engage
- Emily Johns-O'Leary, PhD Candidate
- Kelsey Ostenaa, Sponsored Projects Manager
- Valerie K Otero, Professor
- Karla Scornavacco, Director of Field Experiences
- Terri S. Wilson, Associate Professor

The BC was supported by the Leadership Team which consisted of the following members (in alphabetical order):

- Suzanne Bonomo, Director of Fiscal Planning and Human Resources Administration
- Elizabeth Dutro, Professor and Associate Dean of Faculty
- Mileidis Gort, Professor and Associate Dean of Students
- Grace Maniscalco, Director of Special Projects
- Joseph Polman, Professor and Associate Dean for Research
- Fernando Rosario-Ortiz, Interim Dean

The BC met with members on the Leadership Team or additional outside members on the following dates, with the following agenda items:

- April 19, 2024
  - The committee met with the Executive Team and Leah Sprain, Associate Professor and Associate Chair for Graduate Studies from the Communication program to discuss the committee's charge and the committee's process for discussion and resolution
- April 24, 2024
  - Ann Schmiessing, Vice Chancellor for Academic Resource Management, and Mandy Cole, Associate Vice Chancellor for Budget & Planning, presented information about the CU System and University Budget Model
  - SOE members presented about the School of Education Budget Projections
- May 8, 2024
  - Suzanne Bonomo presented about funding categories in the SoE budget
  - Grace Maniscalco presented about the SoE organization
  - Elizabeth Dutro presented about the SoE faculty
- May 22, 2024
  - Joe Polman and Suzanne Bonomo presented additional information about the SoE budget related to administration: appointments, leadership roles, course releases and buyouts
- June 5, 2024

- The Budget committee met for 30 minutes with C-Shift, the organization that is undertaking the study of SoE administration and staff

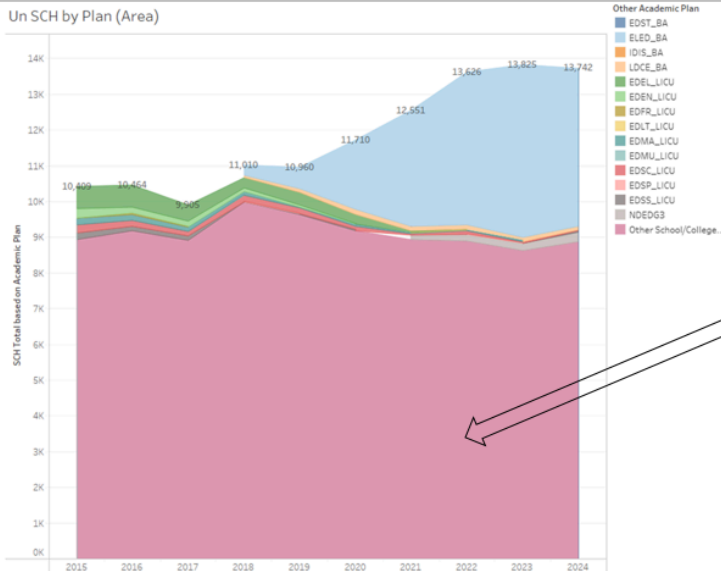
In addition to meetings with outside members, the Budget Committee had the following meetings:

- Office Hours: Every Monday from May 6 through June 24 we offered an hour-long opportunity for any individual to meet with the committee to share thoughts and ideas. Each week two committee members were available at either 9am or 1pm in-person in MBE 144 or via Zoom.
- Internal Meetings: The committee had a number of meetings through May and June to discuss topics and recommendations
- Drafting the Report: Beginning on June 12, the Budget Committee split into subgroups around topic areas to write up a set of recommendations. Much of this work occurred asynchronously. Recommendations were reviewed collaboratively and discussed on June 25 and 28, in order to produce this final report.

## Appendix B

### Undergraduate Education

#### School of Education Undergraduate Academic Portfolio "At-a-Glance"



- The SoE **ELED\_BA** Education plan (light blue) is the primary UG academic plan with a SoE College of Record (CoR)
- Undergraduate SCH delivery is dominated by other school/college academic plans (pink); The core funds allocation College of Instruction (COI) design parameter is a benefit due to the high SCH delivery by SoE faculty to students with other majors

University of Colorado Boulder  
School of Education  
Fall Semester Enrollment (at Census) - 2019 to 2023

Enrollment Level	Program	Fall 2019	Fall 2020	Fall 2021	Fall 2022	Fall 2023
UG MINOR	Education	98	101	102	115	129
	Leadership Studies	359	367	355	320	315
	<b>Subtotal</b>	<b>457</b>	<b>468</b>	<b>457</b>	<b>435</b>	<b>444</b>
UG MAJOR	Elementary/Education	167	223	256	262	256
	Education Studies					1
	Leadership & Community Engagement	27	44	52	35	34
	Interdisciplinary Studies	3	1	2		
	<b>Subtotal</b>	<b>197</b>	<b>268</b>	<b>310</b>	<b>297</b>	<b>291</b>
UG LICN	Elementary/Education	31	11			
	CUTeach	39	24	17	20	34
	--Secondary/Mathematics	22	10	10	12	17
	--Secondary/Science	17	14	7	8	17
	Secondary/Humanities	25	10	33	55	68
	--Secondary/English	14	5	13	26	26
	--Secondary/Social Studies	8	2	16	26	40
	--Secondary/World Languages	3	3	4	3	2
	K-12 Music Education	12	11	4	16	26
	<b>Subtotal</b>	<b>107</b>	<b>58</b>	<b>54</b>	<b>91</b>	<b>128</b>
PBA LICN	Elementary/Education	16	2	1		
	CUTeach	8	6	7	5	2
	--Secondary/Mathematics	2	3	1	4	
	--Secondary/Science	6	3	6	1	2
	Secondary/Humanities	6	1	2	1	1
	--Secondary/English	3				
	--Secondary/Social Studies	3				1
	--Secondary/World Languages		1	2	1	
	K-12 Music Education				1	
	<b>Subtotal</b>	<b>30</b>	<b>9</b>	<b>10</b>	<b>7</b>	<b>3</b>
MA+ LICN	CUTeach	5	11	13	11	13
	--Secondary/Mathematics	2	3	1	1	6
	--Secondary/Science	3	7	10	10	7
	--Unknown Licensure Path		1	2		
	Secondary/Humanities	6	20	18	7	10
	--Secondary/English	4	6	10	2	4
	--Secondary/Social Studies	2	14	8	5	6
	<b>Subtotal</b>	<b>11</b>	<b>31</b>	<b>31</b>	<b>18</b>	<b>23</b>
GR CERT	Graduate Certificate in Teacher Leadership		<b>9</b>	<b>8</b>	<b>10</b>	<b>7</b>
MA	MA in Curriculum & Instruction	42	32	27	13	10
	--Humanities Education Track		3	5	2	1
	--Literacy Education Track		4	6	5	
	--Math & Science Education Track		5	8	5	7
	--Unknown Track	42	20	8	1	2
	MA in Educational Equity & Cultural Diversity	154	141	91	34	47
	Educational Foundations, Policy & Practice	39	47	56	51	45
	--MA in Educational Foundations, Policy & Practice	12	16	24	21	27
	--MA in Higher Education	27	31	32	30	18
	MA in Learning Sciences & Human Development	6	8	6	5	2
	MA in Teacher Leadership			1	1	
	<b>Subtotal</b>	<b>241</b>	<b>228</b>	<b>181</b>	<b>104</b>	<b>104</b>
PHD	Emphasis in Equity, Bilingualism & Biliteracy	15	17	13	13	15
	Emphasis in Educational Foundations, Policy & Practice	27	21	23	20	20
	Emphasis in Learning Sciences & Human Development	17	15	14	12	17
	Emphasis in Literacy Studies	27	23	17	15	10
	Emphasis in Research & Evaluation Methodology	12	11	9	9	7
	Emphasis in STEM Education		1	5	7	9
	Emphasis in Teacher Learning, Research & Practice		3	6	9	11
	Emphasis Unknown				3	3
	<b>Subtotal</b>	<b>88</b>	<b>91</b>	<b>87</b>	<b>88</b>	<b>82</b>
<b>SOE TOTAL*</b>		<b>684</b>	<b>692</b>	<b>681</b>	<b>615</b>	<b>648</b>

\*This is an unduplicated head count which excludes minors

Output from E:\Groups\Admin Team\Data and Reporting\SA SPA\docs\requests\SOE\_Enrollment\_Trend.xlsx produced on 29 JAN 2024



<b>ACTIVITIES INCENTIVES</b>	<b>FY23 July</b>	<b>FY24 JULY</b>	<b>FY25 JULY</b>
UG College of Instruction Allocation	\$3,164,714	\$3,411,078	\$3,483,543
UG College of Record Allocation	\$1,143,038	\$1,220,851	\$1,295,289
UG Graduation Priority Allocation	\$48,013	\$128,141	216,310
UG Retention Priority Allocation	\$182,628	156,687	180,681
<b>Total Net Undergraduate Core Funds Allocation</b>	<b>\$4,538,393</b>	<b>\$4,916,757</b>	<b>\$5,175,823</b>
Net Graduate Tuition: Graduate COI Allocation	\$870,628	\$675,393	670,746
Net Graduate Tuition: Graduate COR Allocation	\$1,063,419	\$754,191	685,061
Net Graduate Tuition: PMP & Other Allocation COI	\$1,721	\$6,541	4,145
Net Graduate Tuition: PMP Allocation COR			
<b>Total Net Graduate Core Funds Allocation</b>	<b>\$1,935,768</b>	<b>\$1,436,125</b>	<b>\$1,359,952</b>
<b>TOTAL CORE FUND ALLOCATIONS</b>	<b>\$6,474,161</b>	<b>\$6,352,882</b>	<b>\$6,535,775</b>

## APPENDIX C

### Draft responsibilities for Associate/Assistant Dean(s) for Undergraduate and Teacher Education

The Associate Dean(s), with similar structure and term limits as other AD positions, would serve as a representative within the School of Education leadership structure and lead efforts to align and strengthen academic services and student support.

#### Responsibilities would include:

- Strategic visioning and allocation of resources for undergraduate *and* teacher education
- Coordination and collaboration of advising office, scheduling, admissions, and Chairs/Directors responsible for undergraduate & teacher education programming.
- Reviewing & updating of policies and practices, including
  - The School of Education's Student Handbook, Teacher Education Handbook, and Professional Code of Conduct
  - Cases of student dismissal, or off-ramping from programs
- Hearing and addressing student grievances and student misconduct
- Advocacy and leadership for SOE undergraduate and teacher education with campus and communities
- Teacher Education specific responsibilities must also be a part of this role; if the responsibilities are not with the Associate Dean then these responsibilities must be written into - and compensated for - in another faculty or staff role:
  - Lead or consult on fundraising efforts to diversify teacher education, including the diversity and social and financial needs of candidates

- Serve on high-impact committees with the state, and provide feedback on initiatives, grants, and new legislation
- Attend Colorado Council of Deans and Directors of Education (CCODE) meetings and retreats; Attend CDHE conferences, legislative preview sessions, and bi-annual state update meetings
- Innovate and advance curricular and learning goals across the programs, including planning and coordinating resources and professional learning on critical topics (e.g., school shootings and emergencies; wellness; disability services; newcomer supports)
- Develop and engage in teacher ed-wide goal setting and program improvement through use (and refinement of) data systems, such as student teaching exit surveys and faculty evaluations/surveys
- Guide and ensure completion of the reauthorization of licensure programs
- Support teacher education chairs/directors in accomplishing their roles and responsibilities, including serving as a sounding board for dilemmas that arise
- Develop and share an annual Teacher Education report as part of teacher education dialogue and refinement

## Appendix D

### PhD Student Admissions and Enrollment, 2013-2023:

Year	# PhD Students Admitted	# PhD Students Enrolled	% Admitted and Enrolled
2013	23	16	70%
2014	24	14	58%
2015	26	16	62%
2016	35	23	66%
2017	27	12	44%
2018	29	18	62%
2019	32	19	59%
2020	21	12	57%
2021	30	14	47%
2022	24	10	42%
2023	28	17	61%

## Appendix E: CU Engage

CU Engage is housed in the School of Education but **serves the entire CU Boulder campus**. Our mission is to *collaborate with communities, schools, and organizations to address complex public challenges. CU Engage faculty and students facilitate the development of equity-oriented partnerships that sustain engaged learning and mutually beneficial community-based research*. Collectively, CU Engage programs push beyond disciplinary boundaries and institutional constraints to create spaces of liberation, healing, and action for students who are marginalized within the context of a historically and predominantly white institution. Our research is co-developed and co-implemented with communities. We are doing the collective social justice work that SOE centers in helping to shape a generation of community scholars and leaders that advocate for loving, critical, and empowering approaches to education. Program directors support each other across diverse community and institutional contexts, and students benefit from being able to flexibly move across CU Engage programs.

CU Engage teaches primarily undergraduates, with 24 courses / 51 sections courses in AY23-24 (see table below). Over the past 5 years, CU Engage generated an average of 3175 undergraduate student credit hours (SCH) per year. Over that same period, the School of Education averaged 13,030 SCH, meaning CU Engage accounts for 25% of SOE undergraduate credit hour generation. The COI and COR revenues generated from CU Engage- funded courses exceed what the center receives from SOE in core funds.

As part of this work, CU Engage coordinates, staffs and **funds** the Leadership & Community Engagement (LDCE) major and the Leadership minor. CU Engage helped craft the degree proposal for the Leadership and Community Engagement Major. The Leadership minor offers courses that are mainly at capacity, but could grow by adding additional course sections. The LDCE major does have capacity in its core courses, and thus great potential for growth. Larger enrollments in courses could generate an additional \$250,000 (at 75% capacity) to \$350,000 (at 100% capacity) in tuition-based revenue per year, with no additional costs.

In addition to the major and minor, our programs include INVST Community Studies, Public Achievement, Multicultural Leadership Scholars (MLS), Puksta Scholars Program, Aquetza, CU Dialogues Program, Graduate Fellows for Community Based Research, The Research Hub for Youth Organizing and Education Policy, and Swap. Some of these programs are connected, in part, to undergraduate courses and programs, including Public Achievement, MLS, and INVST. Across all programs, CU Engage has 12 part-time and full-time teaching professors (8.0 FTE), many of whom are directors of their programs. It is supported by 4 staff members (2.8 FTE) and in 2023-2024 provided GRAs/GPTIs to 12 SOE PhD students with a total cost of \$290,088. (These GRA & GPTI positions are funded from CU Engage's budget, not from SOE budget lines).

Importantly, while housed in the School of Education, CU Engage was founded to serve the whole campus. Prior to CU Engage's founding in 2014, there were a number of community-engaged programs scattered around campus; the vision was to put them into one administrative and academic unit. The funding to establish CU Engage came from continuing lines inherited from existing programs and Provost support. The Provost Moore and Vice-Chancellor for Continuing Education Ann Heinz "shopped" the center to various colleges and the School of Education agreed to house it. At that time there was an explicit agreement that the SOE would not provide any direct funds to the center, but would offer administrative support. Over time CU Engage generated revenue from the Enrollment Growth Budget model. These funds became part of CU Engage's continuing funds in the new budget model.

CU Engage is of great value to CU Boulder and to the Colorado community. Many of CU Engage's programs are open to--and serve--students and faculty across the entire campus. For example, CU Dialogues has helped GTPIs and Faculty integrate dialogic pedagogy into their teaching. They also partner with Finance and Business Strategy and OIT to co-design DEI dialogues that are facilitated by staff in these units. The Puksta Scholars Program is part of an annual gift of \$60,000 annually for student scholarships across campus. SWAP is a student run group that pairs undergraduates and front line service workers to teach and learn English and build community.

Just as the SOE's teacher education (TE) programs produce the next generation of socially and culturally aware teacher leaders, CU Engage is producing the next generation of socially and culturally aware community leaders and scholars. CU Engage's field-based components require extra instructional effort as well as staff that are specifically hired to coordinate these community experiences.

Requests:

- CU Engage requests SOE to continue transferring the core funds over the next two years as it re-organizes. This will enable them to work with the new dean to establish a plan for sustainability.
- Moving forward, CU Engage would like greater integration with SOE. There is considerable overlap with other practicum and field based programs such as teacher education, learning science community based courses. For instance, CU Engage and Teacher Education are often working in the same schools, but often in isolation from each other. Building a SOE-wide infrastructure for community education and field experiences would be beneficial to better integrate its various programs, majors, and minors into the regular operations of the SOE.
- CU Engage is actively in the process of reorganizing towards sustainability, considering options combining programs, forming partnerships and seeking new sources of funding from campus and external sources. There is considerable room for growth in the Leadership and Community Engagement Major and Leadership Studies minor which can contribute to the sustainability of the School of Education and support the smaller and more resource intensive programs that so effectively support minoritized, first-generation undergraduates and communities..
- CU Engage programs serve the whole campus and surrounding communities. We appreciate the support that the Interim Dean has initiated to secure on-campus funding streams. We want to continue this advocacy in arguing for greater distribution of supplemental funds to support campus goods.

#### CU Engage Courses 2023-2024

#	Fall 2023	Title
1	EDUC 2910-MLS	Field Practicum 1
2	EDUC 2919-010	Renewing Democracy in Communities and Schools
3	EDUC 4500-001	Community Based Research for Social Change LDCE

4	INVS 2005-010	Puksta Scholars Practicum
5	INVS 2989-001	Dialogues Across Difference
6	INVS 3100-801- MLS	Social Justice, Leadership and Community Engagement Internships
7	INVS 3100-001 LDCE	Social Justice, Leadership and Community Engagement Internships
8	INVS 4919-010	Teaching Social Justice for Public Achievement
9	LEAD 1000-001	Becoming a Leader
	LEAD 1000-002	Becoming a Leader
	LEAD 1000-003	Becoming a Leader
	LEAD 1000-004 Asynch	Becoming a Leader
	LEAD 1000-005	Becoming a Leader
	LEAD 1000-006	Becoming a Leader- Sport
	LEAD 1000-007	Becoming a Leader- Sport
	LEAD 1000-008	Becoming a Leader
	LEAD 1000-009	Becoming a Leader
10	LEAD 1001-001	Becoming a Leader-MLS
11	LEAD 1002-001	Becoming a Leader-LDCE
12	LEAD 4000 -010	Leadership in Context and Emerging Challenges: A Capstone
	LEAD 4000 -030	Leadership in Context and Emerging Challenges: A Capstone
	LEAD 4000-050 Asynch	Leadership in Context and Emerging Challenges: A Capstone
13	LEAD 4501-001	Leadership Capstone
Spring 2024		
14	EDUC 2500-001	Strategies for Social Change
15	EDUC 2800- 310r	Special Topics
16	EDUC 2800-311R	Special Topics
17	EDUC 2919-010	Renewing Democracy in Communities and Schools
18	EDUC 2920-001	Field Practicum 2
19	EDUC 4150/5150-001	Intro to Qualitative Methods
20	INVS 2005-020	Puksta Scholars Practicum
21	INVS 2989-001	Dialogues Across Difference
22	INVS 4919-001	Teaching Social Justice for Public Achievement
	LEAD 1000-001	Becoming a Leader
	LEAD 1000-002	Becoming a Leader
	LEAD 1000-003	Becoming a Leader
	LEAD 1000-004	Becoming a Leader

	LEAD 1000-005	Becoming a Leader
	LEAD 1000-007	Becoming a Leader
	LEAD 1000-008 Asynch	Becoming a Leader
	LEAD 1000-009 Asynch	Becoming a Leader
	LEAD 1000-010 Asynch	Becoming a Leader
	LEAD 1000-011 Asynch	Becoming a Leader
23	LEAD 2410-001	Dynamics of Power, Privilege and Oppression
	LEAD 4000 -010	Leadership in Context and Emerging Challenges: A Capstone
	LEAD 4000 -030	Leadership in Context and Emerging Challenges: A Capstone
	LEAD 4000 -040	Leadership in Context and Emerging Challenges: A Capstone
	LEAD 4000 -050	Leadership in Context and Emerging Challenges: A Capstone
24	LEAD 4502-001	Leadership Capstone
Summer		
	LEAD 1000-001- summer	Becoming a Leader
	LEAD 1000-600- summer	Becoming a Leader
	LEAD 1000-700- summer	Becoming a Leader

## Appendix F: The Learning Assistant Program

The LA model began at CU Boulder in 2001 and has since spread throughout the world. The LA model is now in 34 countries and all over the United States. A national research agenda reflects over 100 peer-reviewed articles about the impacts of the LA model on students, faculty, LAs, and on institutional change. Their staff at CU Boulder is one director (research associate, 0.7 FTE), two TPs (2 FTE), one faculty director, 1 software developer, and one administrative assistant. The group teaches approximately 375 students per year in EDUC courses. These new LAs (who take the course), along with approximately 100 returning LAs and LA mentors support approximately 20,000 students each year.

The vision of the Learning Assistant (LA) model at CU Boulder is to efficiently build lasting capacity among faculty, courses, and departments for sustained offerings of high quality, learner-centered instruction. In these settings, every student feels included and valued and is comfortable accessing multiple forms of support inside and outside of the classroom. CU Boulder students who serve as LAs and LA Mentors become effective leaders, teachers, and team members, prepared for the increasingly diverse and interdisciplinary workforce.

The mission of the CU Boulder LA program is to provide infrastructure necessary for improving student success by increasing the diversity of CU Boulder's instructional teams through the inclusion of pedagogically trained, undergraduate Learning Assistants (LAs). Ongoing development opportunities and communities are available for faculty, departments, and undergraduates with continued support leading to growth and development as educational leaders, mentors, and state of the art educational innovators.

The LA model is an efficient, effective, and equitable program for building and maintaining excellent experiences for students and faculty across the CU Boulder campus.



AY22 numbers. The cost of the program was \$55.00 per impacted seat.

\*There is some duplicated headcount

## Appendix G: Master's in Teacher Leadership (MATL)

The Masters in Teacher Leadership program upholds the mission of the School and University by serving rural teachers, partners, and communities across the state. It is an innovative online program which offers rural educators a low-cost opportunity to develop their skills through certificates that can be “stacked” in a Master’s degree. Certificates are \$5,000 and completing three (each includes a synchronous summer capstone) leads to a MA, with a total degree cost of \$15,000. This program was started with funding from the CU Regents’ “Moonshot” initiative designed to catalyze the creation of low-barrier, low-cost, on-line degrees for those historically marginalized across the state, including rural communities and indigenous populations.

Emily Gleason, Dan Liston, and Paula Battistelli developed this innovative program over two years (including creating their own technical infrastructure software). They started by listening to rural educators about what skills they would like to develop, the format, and costs they could afford. The program’s goal is to help rural educators develop skills, get credentialed, and become agents of change in their schools and communities. Importantly, the program creates welcoming spaces where teachers receive culturally sustaining content and antiracism training, attuned to the rural communities.

Launched in 2020 the program has served 240 rural educators of which 27 have received their Master’s degree (expecting 15 more in 24-25). Even though MATL was launched at the start of the pandemic, it has seen steady growth, averaging 15% increases in credit hours annually.

The program is positioned to reach sustainability by FY27 with increased campus support and a revised and streamlined budget plan. However, there have been a number of challenges that put added pressures on sustainability.

- Financial: The most important barrier is MATL has not received the tuition revenue that Budget and Fiscal Planning (BFP) integrated into the approved budget. The program has been told that this decision is final, meaning a revenue loss of \$644,000. Without this revenue, sustainability is a challenge, but not insurmountable.
- Pandemic realities: Starting the program in 2020 created significant challenges. Teachers were very overworked and stressed and many were already overwhelmed by teaching on-line. This likely led to some of our slower growth rates at the beginning. Teachers are STILL overworked and also desperately want and need high quality professional learning opportunities at an affordable price.

- Marketing: MATL never received marketing support from the Office of Strategic Communications as originally proposed.
- Technological: MATL developed their own software in conjunction with OIT and the registrar's office. MATL required new technical infrastructure as a different way to offer graduate courses. It was housed by CU's Office of Academic and Learning Innovation (OLI). This office made a decision that online degrees that were part of a new suite of online degrees should be housed and offered through Coursera rather than CU's LMS, Canvas. MATL did not want to partner with Coursera due to its limited pedagogical model which deviates from the vision, approach, and model of teacher professional learning. As a result of not agreeing to be part of Coursera, and in an effort to offer federal financial aid, the MATL is transitioning to Continuing Education beginning Fall 2024.
- Financial Aid: Certificates are not eligible for federal financial aid. Students who enroll as Master's students and those taking their third certificate are able to get financial aid.
- When and how to count students: MATL lets students start at any time and progress at their own pace. CU Boulder only counts students at census dates. Rolling admissions makes it difficult to calculate enrolled students and revenue.

#### Sustainability Plan:

MATL has significant roll forward for FY25. They are also making targeted cuts. The main need is for a decision from the office of Budget and Fiscal Planning in terms of how much of the tuition revenue returns to the MATL program. With this information, they will be able to plan their budget and programming. More resources from SOE and support for CE will enable MATL to not only survive, but thrive and be a valuable tool for the entire faculty.

The architecture and design of certificates can be adopted by other SOE faculty and programs. There are a number of different growth opportunities such as CLD endorsements, Peer Physics, Literacy, Mentor teacher certificates, and pathways for Paraeducators to become teachers, among others. There might be ways to use certificates for programs beyond teacher education, such as Leadership, Community-based research, DEI, etc. Currently, the SOE's online offerings are largely limited to existing courses and programs, MATL's architecture can enable SOE to reach and to better serve its diversity, equity and justice mission.

#### Requests:

We recommend that the Dean commit to work with the Vice-Chancellor for continuing education to determine what percentage of tuition revenue generated that MATL receives.

We recommend MATL partner with other programs in SOE on larger grants such as with IHub and Peer physics for DRK12 grant(when RFP is released).

We recommend that the School of Education and Continuing Education continue to support MATL with additional resources for marketing as well as PhD student funding. We also recommend the Dean of the School of Education advocate for scholarships for students as well as more efficient systems between financial aid, registrar, Continuing Education, and the graduate school.

We recommend all campus partnerships create MOUs that detail financial arrangements as well as careful budgetary practices to track transfers.